BONUS Plus Staff FAQ: CIRCULATION

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Automatically Cancelling Expired INN-Reach Holds

BONUS+ implemented automatic cancellation of expired INN-Reach holds (the not-needed-after date feature) in July 2012.

The system automatically cancels INN-Reach holds if the holds are not processed by the owning site **before the not-needed-after date if specified by the patron during requesting**. The patron site automatically cancels its patrons' INN-Reach holds during the night after they become expired (**that is, the night after the specified not-needed-after date**). A hold can be cancelled only if the virtual item record has a status of **REQUESTED** (**&**) or **RE-REQUESTED** (_). These status values indicate that the owning site has not yet processed and sent the item to the patron site.

The system does not cancel an INN-Reach hold once the owning site has processed the request. For example, if the item is waiting on the INN-Reach holdshelf at the patron site for pickup by the patron, the system does not modify the hold if the not-needed-after date passes. The patron site must **Return the item unwanted**.

When the system automatically cancels the expired INN-Reach hold, it performs the same actions it does when staff at the patron site cancel the request. **In addition, it queues a hold cancellation notice for later printing.**

To ensure that a hold cancellation notice is generated local libraries must specify the cancellation text the system includes in the cancellation notices, and set the **Hold Cancel Notice: Not wanted after date past: Text #** circulation option. The cancellations are counted in the central server Cancellation Statistics report.

For more information see *Millennium User Manual Page Page # 107958 and 101968.*

Katie Wilson
BONUS+ Project Co-ordinator
December 2012, August 2013.

Automatically Forwarding INN-Reach Requests

BONUS+ implemented the auto-forwarding of requests in July 2012.

The BONUS+ system software automatically forwards a request when the requested item has been paged at a local site for more than **144 hours (6 days).** The system automatically forwards requests during the night after they become eligible for forwarding. When a request is automatically forwarded, the system cancels the item holds at the local site and submits the requests to the BONUS+ Central Server for **re-request**.

No other available item
If the BONUS+ Central Server cannot identify a matching item at another site, it sends a cancellation message to the patron site. At the patron site, the system:

- Removes the INN-Reach hold from the patron's hold queue.

- Removes the virtual item record either immediately (if the patron site has NOT enabled the printing of hold cancellation notices) or when the patron site prints hold cancellation notices.
- (Optional) Queues a hold cancellation notice for the request.
- (Optional) Automatically forwards the cancelled request data to your ILL department if your site has acquired the Pass2ILL for INN-Reach product.

Hold cancellations made using auto-forwarding are “associated with” Cancellation Reason 7 (free text reason) in the INN-Reach Patron Cancellations report. However, if an item cancelled with re-request is then successfully transferred to another library item it is then not counted in the statistics as a cancellation but as a transfer.

This is an automatic process that needs to be manually turned off by Innovative Interfaces staff. For the BONUS+ Christmas/new year period when libraries are closed, BONUS+ Co-ordinators will need to review library closure times at each November meeting and determine the time period during which the process will be turned off. The BONUS+ Project Co-ordinator will then notify Innovative Interfaces of the date to turn the process off, and when to resume. Innovative staff need to be notified two weeks in advance.

Automatic Forwarding Feature v. Paged Too Long Report
When forwarding requests, the Automatic Forwarding of requests uses the exact hours specified at setup. However, the "Paged Too Long" report displays hours rounded up to days. As a result, items that are not yet paged longer than the number of hours set in the Automatic Forwarding of requests may appear on the "Paged Too Long" report. For more detail see *Millennium User Manual Page # 107128.*

Automatic Hold Selection

The BONUS+ Central Server system manages holds options for the entire system. The system is set to place holds on an item following a request if there are no available items for loan. The Central Server system holds options (see below) prevent the system from placing holds on items that are not likely to be returned soon.

BONUS+ patrons are able to place holds when all the requestable copies of an item are checked out. Holds cannot be placed for items with status other than **Due Date** or **HOLD** (e.g., MISSING, BILLED, LIB USE ONLY, etc.) In the case of items that already have holds, the BONUS+ Circulation hold will be added to the end of the existing hold queue. BONUS+ Circulation holds operate in exactly the same manner as holds placed for items at the local site; the hold is filled in the order in which it is received.

For multi-volume works that have volume information in the item record volume field attached to the bibliographic record, the patron specifies the desired volume and copy after the BONUS+ System verifies the patron.

The BONUS+ Central Catalogue performs the following steps to determine which item to hold:

1. Finds all available items that could satisfy the request. **BONUS+ does not allow local patrons to request items that are available for loan in the local catalogue.**

2. Evaluates whether any of these items are ineligible to receive the hold according to the settings of the BONUS+ Central Server Holds Options (see below). BONUS+ discards any ineligible items.

3. Consults the **Request Balancing Table** to determine if any of the remaining item(s) should be given priority. If possible, the BONUS+ Catalogue selects an item according to the criteria specified in this table.

4. If no items have priority based on the Request Balancing Table, the BONUS+ catalogue randomly chooses one of the remaining items.

BONUS+ Central Server Holds Options

Central Server Holds Options are used to prevent the BONUS+ Catalogue from placing holds on items that are not likely to be returned soon.

Maximum Number of Holds

Specifies the maximum number of holds that an item can have and still be eligible to receive a hold **BONUS+ set to 1**

Maximum Number of Days Until Due

Specifies the maximum number of days from today that an item can be due and still be eligible to receive a hold **BONUS+ set to 14**

If there is only one available copy in BONUS+ and it is on loan an error message will show:

No copies available for request

Maximum Number of Days Overdue

Specifies the maximum number of days that an item can be overdue and still be eligible to receive a hold **BONUS+ set to 10**

Ratio of Local Title-Level Holds and Attached Items

Specifies the maximum ratio of title-level holds to attached items that a local bibliographic record can have, and still be available for BONUS+ requests. The BONUS+ Catalogue automatically determines whether this ratio has been exceeded. If the ratio has been exceeded, the BONUS+ Catalogue blocks BONUS+ requests from being placed on any of the items attached to the bibliographic record. Unlike the other BONUS+ Central Server Holds Options, a different ratio can be established for each Local Server in the BONUS+ System. **Not currently set in BONUS+**

Adapted from Innovative Interfaces, *Guide and Reference* R2009B Page # 107954

BONUS+ Virtual item record circulation status codes

Code in Millennium/Sierra record	Display name	Meaning
@	OFF SITE	Checked out to BONUS+ library (remote site)
#	RECEIVED	Item received from borrowing library
%	RETURNED	Item returned to owning site through **Return Unwanted Item.** In Transit message is added to the virtual item record
&	REQUESTED	Item requested for client
_	REREQUESTED	Requested item not available locally; request cancelled and sent back to BONUS+
(	PAGED	Requested item on paging list that has been printed
)	CANCELLED	Requested item has been cancelled
+	RENEW PENDING	Client has requested renew; BONUS+ checking for holds at owning library
=	RENEW DENIED	Renewal denied because of local hold on item at owning library

BONUS+ Web OPAC messages for clients requesting BONUS+ items

Web OPAC message	Meaning
Sorry, no copies available for requests	All copies of this title have the status LOCAL USE ONLY
You cannot use BONUS+ to request items that are available at your institution	This item is available for loan at your local library and cannot be requested from BONUS+
Invalid PIN	PIN number entered does not match the PIN in your library card.
You do not have a PIN in your record	Your library card record does not contain a PIN number. Please contact a library staff member.
Sorry, your ID does not match your name	The name that you entered does not match of the name in your library record
Sorry, your ID is valid.	Using the ID you entered, BONUS+ was unable to locate your library card record
Request cannot be processed. Data in your record at your institution incomplete.	One of the data elements entered is not in your library card. Please contact a library staff member.
Sorry, request cannot be processed. Cannot access your patron record	BONUS+ cannot check your library card details from your local catalogue
Sorry, request refused. Problem with your record at your institution.	Your library card is blocked at your local library. Please contact library staff.
Sorry, you are not allowed to request this item over BONUS+	You are not eligible for requesting through BONUS+ (or there is a problem with the set up).
Sorry, you are not able to request items	You are not eligible for requesting through BONUS+
Sorry, you have requested more items than allowed	You have reached the maximum number of BONUS+ requests: Undergraduate students – 5; Postgraduate students and staff – 10.
Sorry, circulation policy does not allow your request	You requested a copy with a status other than AVAILABLE
Sorry, this title is not available	A coding error means this title is not able to be requested.
Not renewable (item has holds)	Item cannot be renewed because of local holds at owning library
System is checking the availability of the item for renewal. Please check back later to find out if your renewal was allowed	There is a delay in BONUS+ checking for local holds on the item at owning library

Circulation Loan Reports Procedures

BONUS Plus member libraries need to regularly run Circulation loan reports from local Millennium/Sierra Circulation to manage BONUS+ loans. Procedures for accessing reports and recommended actions are shown in the following pages.

- There are six different reports
  - Institutional Overdues
  - Paged Too Long
  - Received Too Long
  - Requested Too Long
  - In transit Too Long
  - Returned Too Long

- The recommended times for running the reports are in ***bold italics*** next to each report. ***These times can be varied locally and depend on distances between libraries.***

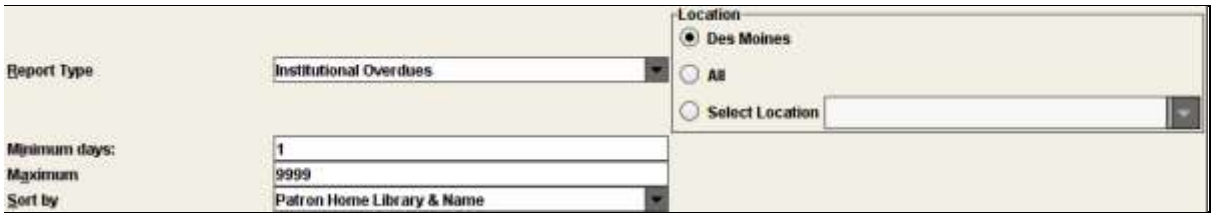
- The recommended number of days for each report to generate is marked in ***bold italics. These times can be varied locally.***

View **Reports** from local Millennium/Sierra Circulation client software. Authorisation for function 340 (INN-Reach Reports) is required.

1. In Sierra choose INN-Reach – Reports from the Function list.
2. Select individual reports from the **Report Type** drop down menu
3. When finished with one report Close and select another.

Report Types

1. **Institutional Overdues Report.** Generates reports of the library's overdue items currently on loan to other BONUS Plus libraries. ***Run Monthly.***
   - Select **Institutional Overdues** from the Report Type drop-down list



Select Settings

- Number of days an item must be overdue to be included in the report
  Minimum days: 10
  Maximum number of days overdue: 9999 (reports all overdue items)

Select the branch location for which you want to view overdues.

- There are two options to **Sort by**. The **Item Location and Call Number** report sorts by shelving location and subsorts by call number within a location. The **Patron Home Library and Name** report sorts by patron site and then subsorts by patron name.

- Select **Prepare** button on top toolbar to generate report

- Sort reports while viewing by changing the Sort by parameter, or select a column header, e.g. **Due Date**
- To view more detail right mouse click on an entry and select **View Detail**

- Print reports using **Print** button on top tool bar.

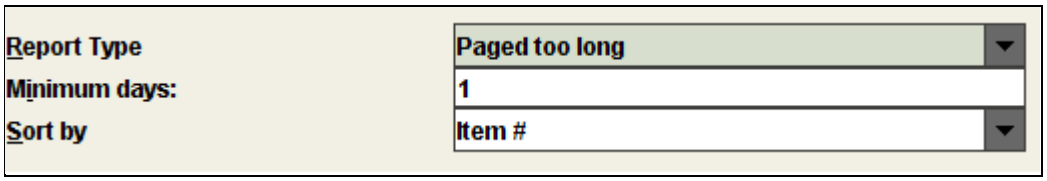
Action

1. ***Use printed list to search the owning library's (i.e. your library) shelves for items that have been returned and reshelved, but not checked in.***
2. ***Check in items found on shelves and re-run the report.***
3. ***Print to email for forwarding report to libraries with outstanding items.***
4. ***Send the re-run report to other libraries for their action and follow up***

2. PAGED TOO LONG items. *Run Weekly*

Lists a library's items that have been requested and ***paged*** for loan, but that have not changed status in more than ***two*** days. The items have been requested but they are still waiting to be processed at the owning library.

- Set **Minimum days** to **2**
- **Sort by Item location**
- Choose **Prepare** to display the Paged Too Long report.
- **Home Library** refers to the patron location.
- **Right mouse click** on **Call #** column header to toggle to **Barcode** display
- **Copy or print report**

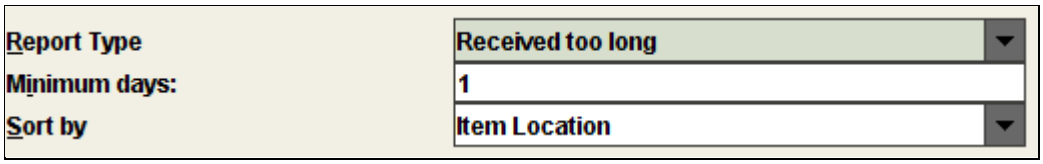


***ACTION*: Owning library to fill requests or transfer request to another library or cancel if no copies available.**

3. RECEIVED TOO LONG items. *Run Weekly.*

Lists all Circulation items that a library has ***received*** from other libraries but that have not been picked up by the patrons who requested them within ***eleven*** days.

- Set **Minimum days** to **11**
- **Sort by Received date**
- **Prepare report**



ACTION

- ***Go to Millennium Circulation Holdshelf and Print INN-Reach holdshelf reports. Identify items to be returned and remove from physical holdshelf.***
- ***Go to* INN-Reach - Return Unwanted Item mode:**

  - To prepare items to return to owning libraries, scan barcodes of items to be returned.
  - **Print** a cancellation notice and/or a transit slip when prompted and select **OK**.
  - A transit slip prints immediately. If you choose to print a cancellation notice to be delivered to the patron, print or send it from **Notices** mode.
  - Return the items to the lending library.

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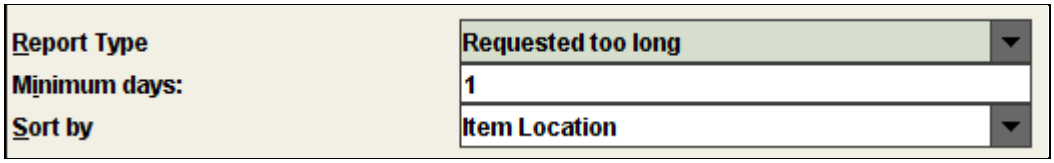
4. REQUESTED TOO LONG items. *Run Weekly*

Lists all the Circulation items that your patrons have **requested** from other libraries but whose status ('&' (REQUESTED)) has not changed within ***three*** days.

- **Sort is by Patron Home library, subsorted by patron name, or Date Requested**
- Choose **Prepare** to display the **Requested Too Long** report
- **Prin**t to email to forward to lending library if required



***ACTION*: Email reports to lending libraries (item location) to find out if the requests have been processed.**

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5. IN TRANSIT TOO LONG items. *Run Weekly*.

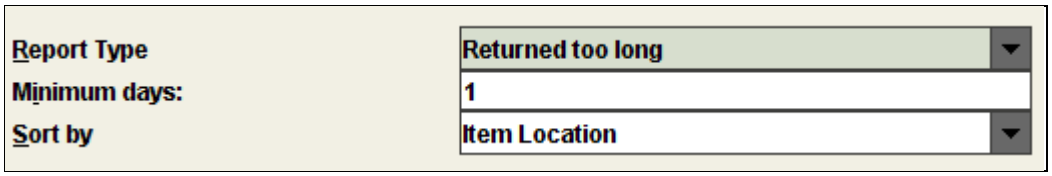
This report lists all the items that have been sent to a library by another library, with a status of **In Transit,** but that have not been **received** within ***seven*** days.

- Select **In transit too long** from the Report Type drop-down list.
- In the **Minimum days** box, enter **7**
- Sort by **Item Location**
- **Prepare** report
- **Print** to email for forwarding to lending libraries

***ACTION*: Check with lending libraries to verify that items have been sent.**

6. RETURNED TOO LONG items. *Run Weekly*

Lists items checked in at the borrowing library with the status **%** (RETURNED), but that have not been checked back in by their owning library within ***ten*** days. The system assigns a virtual item the status **%** when the borrowing library checks in the item and sends it to the owning library.



ACTION:

- ***Borrowing library to contact lending libraries and ask to verify status of items.***
- ***Lending library to check online catalogue to see if items have been returned.***
- ***If items are not checked in lending library also checks shelves to make sure item wasn't shelved without being checked in.***
- ***If item has been checked in at lending library, borrowing library should remove invalid virtual item from Returned Too Long report using menu option Remove invalid virtual items***

Remove invalid virtual items:

- You can use the Returned Too Long report to delete invalid virtual items from the associated patron's record. A virtual item is considered invalid if its status on the Local Server is '%' (RETURNED) and its status on the INN-Reach Central Server is *not* '@' (OFF-SITE) or '1' (LOAN REQUESTED). (If the item status is '@', the owning site has not yet checked in the item. If the item status is '1', the item is currently being requested.) For example, from the Returned Too Long report you can delete a virtual item with a status of '%' (RETURNED) on both the Local and Central Servers.
- In the **Returned Too Long** report table, select the item(s) to delete from the patron record.
- Choose the **Remove** button or right-click the item and select **Remove Item.**
- Choose **Yes** to delete the item, **No** to return to the report without deleting the virtual item from the patron's record. If you attempt to delete an item with

status @ or **1** at the BONUS+ Central Server, the system displays a Warning that the item cannot be removed.

For more information on INN-Reach Circulation Reports see the *Millennium User Manual* pages 107250 to 107255 and 101023 (Printing the INN-Reach holdshelf report) and 101024 (Return unwanted INN-Reach items) and the *Sierra User Manual*.

Claims Returned Procedures

Background

Claims Returned option does not work exactly the same in BONUS+ as in local system borrowing.

How Claims Returned works in BONUS+

If a BONUS+ item is checked out at the borrowing library and then made **claims returned (Cl Ret),** then the 3 normal CL Ret options do not display and it is immediately checked in off the patron record.

- The BONUS+ catalogue shows the item is unavailable.
- The lending library shows that the item status is “Claims Returned”
- Virtual item record shows the CR note ie ”Tues 03 June 2008 Claims returned by .p000000@utsy
- The borrowing library has no record of this item in Millennium.
- A Claims Returned count is added to the patron record. This may or may not be of concern, depending on how individual sites use this information.

The BONUS+ agreed procedure is to check both libraries collections first. If it is not found, make the item “claims returned” and remove it from the patron record and add a note to both the patron and the item record. More details are given below.

Four different scenarios are shown in Table 1, including the reports which may assist with identifying where the problem may have occurred in the BONUS+ process.

A. Procedures for borrowing library
Patron informs the borrowing library that the item should be “CLAIMS RETURNED”.

1. Check institutional overdues and Returned Too Long Reports regularly as per Table 1. Look for status of “on loan” or “Bonus returned”.
2. Confirm that patron has returned the item.
3. Check own collection in case not recognised as BONUS+ book and also contact lending library and ask them to check if item has already been returned and not checked in.
4. **Ask the lending library for the item details.**
5. If the item is not found by either library then take the book off the patron record and process the item as “Claims Returned”, and notify the lending library that you have done so. (You may need to waive fines or penalty points off the patron record if you consider the client was not at fault. However the Claims Returned count will be added to their record).
6. Add a note to the patron record eg “BONUS + Claims Returned on date D/MM/YY for TITLE patron XXXXXXX from ?? INSTITUTION.”

B. Procedures for lending library

7. Check Institutional Overdues and Returned Too Long Reports regularly as per Table 1.
8. Look for status of “on loan” or “Bonus returned”.
9. Check your own shelves and contact the borrowing library to check their shelves **and ask them for the patron details.** If item not found, the other library will make it Claims returned and remove it from the patron record.

10. Add a note to the ITEM record eg "BONUS + Claims Returned on date DD/MM/YY for patron XXXXXXX from XX INSTITUTION."

11. Keep paperwork of the Patron and the Book title.

12. The lending library should send an invoice to the borrowing library for the replacement costs no later than 12 months after the due date. (See other procedures). Individual libraries may choose to pass on this cost to their patrons or not.

Table 1 - Claims Returned – possible scenarios

Scenario	Status	Identified in Report	Action	Responsibility
1. Item not checked in at borrowing library, then checked in at lending library	ON LOAN	Institutional Overdues Report (min 5 days overdue)	Checked in at lending library after 2- 3 days and ON LOAN status cleared	
2. Item checked in at borrowing library, but not checked in at lending library	BONUS RETURNED	Returned Too Long (Returned but not checked in within 10 days)	Found after shelf check at lending library	
3. Item was checked in at borrowing library then lost at borrowing library or in transit by Australia Post	BONUS RETURNED	Returned Too Long (Returned but not checked in within 10 days)	Not found after shelf check at lending library and at borrowing library	**BORROWING LIBRARY PAYS FOR REPLACEMENT.** **CLIENT IS NOT AT FAULT**
4. Item was never returned to borrowing library	ON LOAN	Institutional Overdues Report (min 5 days overdue)	Not found after shelf check at lending library and at borrowing library	**BORROWING LIBRARY PAYS FOR REPLACEMENT**

Beth Marnane
BONUS+ Site Co-ordinator, University of Technology, Sydney
Revised June 2009

INN-Reach paging slip paper size: A4

The default page size for BONUS+ paging slips does not match Australian A4 paper size.

A new library joining BONUS+ will need to ask Innovative Interfaces to change the page size to A4, as follows:

1. Open a call with Innovative Interfaces helpdesk helpdesk@iii.com and ensure that INN-Reach (site code NSWIR as well as the local site code) are in the call subject line (also cc Greta Descantes, gretad@iii.com).

2. Text of message:

   When printing BONUS+ (INN-Reach: NSWIR) paging slips via a laser printer (A4 size paper) after 4 -5 pages, the information starts to slip.
   Can you please amend the printer settings to Australian A4 paper size.

   This was amended during the initial setup phase of BONUS+. Please refer to NSWD1: c853311: Paging slip length

3. This issue may recur. On completion of a software upgrade at Newcastle, the paging slip problem reappeared and a new call was opened:

   c1128642:unewc: BONUS+ page slip length (A4)

INN-Reach Paging slip retrieval

To retrieve 'lost' INN-Reach paging slips when your printer has failed, printout not successful or PC frozen the following steps may assist.

1. Create a review file of ITEM records

Strategy = **m (Message) has IR00:dd-mm-yy** (date of request). Date of request depends on time of day that paging slips are printed. If these are printed early morning, the date will be the previous day's date.

Review file strategy

Item record display: message field.

BONUS Plus (INN-Reach) and Self check units

Some libraries have problems with self check units not reading barcodes from other BONUS+ member libraries. This has improved for some with Millennium Release 2009B which better incorporates the SIP2 standard. Ensure that the barcode reader has details of the different circulation status codes used with BONUS+.

Suggested solutions for types of self check units are provided below. If you are having problems at your library with reading BONUS+ barcodes, check with other libraries using the same Self-check unit as your library for suggestions.

3M Self check units

Information provided by Murdoch University

- If 3M Selfcheck machines are not reading BONUS+ barcodes, it may be because the barcode types or symbologies are not included in the default list in your Selfcheck machines.

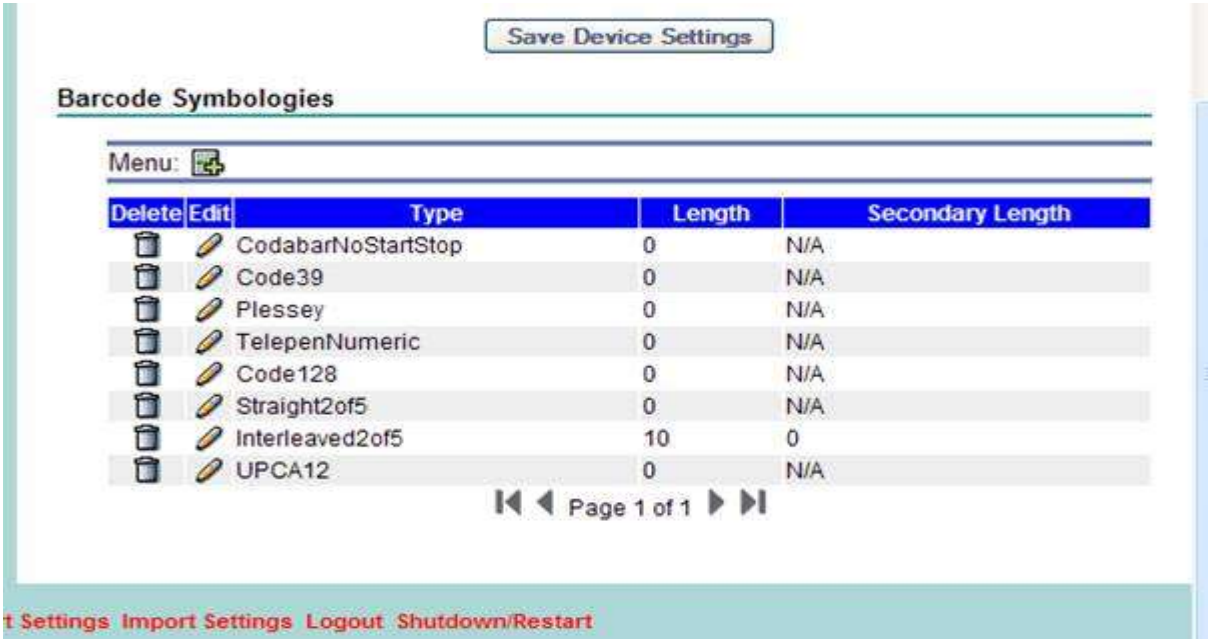
- Find out what barcode symbology the problem barcode belongs to. See table below:

	Balrt	Deak	ECU	LTU	Mass	Murd	QUT	Melb	Newc	UTS	UoW	VU
Barcode	39	39	39	Codabar: start C; stop B	Inter-leave 2 of 5	39	39	Codabar	39	39	39	Coda bar; no start/ stop
Self-check	3M	3M	3M V series	3M	3M, QLS	3M	3M, TagAlert	3M	3M	QLS	TagAlert	3M

- In the 3M system administration, check the Barcode Symbologies or Types setup. The location of this will depend on the model you have, so check the 3M User Manual for details.

- If the problem barcode types are not listed add the new barcode types to the symbologies or types list. Note you can only have seven types, so if you already have seven, you may need to remove unused ones.

Below is a screen shot of the Murdoch University 3M system (3M V-Series 7420) barcode symbologies setup



Information from Mark Pace (3M)

- The customers will need to setup a number of filters using the "ID Settings" tab on the 3M Selfcheck to handle the different barcodes. The 3M SelfCheck User's Guide (Page 61 to 64) and (Page 67 to 72) covers the process required to create filters.
- The first step is to identify what needs to be changed on the barcode to allow the Library Management System (LMS) to accept the item ID (barcode number).
- To create Filters on the 3M SelfCheck, a system administrator will need to log onto the 3M System Manager.

QLS Self check units

According to UTS Library, BONUS+ items can be checked out via QLS self check units due to changes in configuration.
Please contact your local QLS supplier for details.

TAGALERT self check units

It is possible that barcode symbologies in TagAlert systems may not be reconfigured. Contact your TagAlert supplier for confirmation.

The barcode formats for each library are provided below.

BONUS+ Libraries - Barcode formats	
Edith Cowan University	aa5516236B
University of Melbourne	C0000002361 to C0001149920 30001000000010 31290005187158 (most of our items begin 31290) 31399002857323 31400000000054 31649000001229
University of Technology Sydney	3 2007 00452849 0 39339021619561 P9010210769630000
Victoria University	30001010082503
Massey University	1002451871 1061315593
Ballarat University	B444xxxxxxx B444xxxxxxA C0400xxxxxx 3 0002 100xxxxxx
Wollongong University	3xxxxxxxxxxxxx 3 xxxx xxxxxxxx x
University of Newcastle	Exxx xxx xxx
La Trobe	3 xxx xxx xxx 0 3 xxx xxx xxx x 3 xxx xxxxxxx x
Deakin University	3 xxx xxx xxx 0 3 xxxx xxxx xxxx x
Griffith University	AxxxxxxxxB
Queensland University of Technology	AxxxxxxxxB
Murdoch University	35206003618743

Item return not finalised/broken checkout links

BONUS+ items may be checked in at the owning library home site, but not removed from a patron's record; virtual patron data may still be attached.

Occasionally, the central and local servers are not synchronised and this causes the following to occur:

- Item is returned to the 'home' institution and checked in.
- The BONUS+ system message that should be sent to the 'borrowing' institution is not generated.
- The virtual item will not be removed from the patron record.

There is a workaround process to clear this record:

1. Owning library to amend the item status = @ OFF SITE / BONUS OFF SITE

2. Owning library to save and check in item

This process will now send the system generated messages to BONUS+ server & borrowing library server:

3. Item will have status in BONUS+ catalogue as - 'Available'

4. Virtual item will be removed from patron record

Long loans/overrides

Loans that are extended by staff changing the due date manually are not detected in the Institutional Overdues circulation report and are not able to be followed up by owning libraries following the specified Institutional overdue procedures.

Such items are on loan to patrons at other sites for longer than the allowed 21 days + 1 renewal.

Instances of staff extending their own loans manually have been reported at some libraries. Although the software allows this, it should not be encouraged. All BONUS Plus libraries have agreed to a 21 day loan (32 day institutional loan between libraries) and only one renewal. Long loans disadvantage the owning library and are not consistent with the resource sharing spirit of BONUS Plus.

There may also be instances where long loans are caused by renewals not being recorded correctly in the virtual item record.

Below are details of a Review File to find items that are currently @ OFF SITE and were checked out more than 6 weeks ago:

ITEM STATUS equal to "@" AND ITEM OUT DATE less than "23-06-2011"

[sorted by OUT DATE]

Once items are identified BONUS+ Site Co-ordinators can check the borrowing patron record or the local Circulation Overrides file to identify if staff have overridden to extend loans.

Katie Wilson, BONUS+ Project Co-ordinator
Rose Counsel, BONUS+ Site Co-ordinator, University of Ballarat, August 26, 2011

Procedures for Institutional Overdues Billed for Replacement (BFR)

1. A BONUS+ item will reach BFR status when it is 14 days overdue.

2. The borrower is responsible for fines for overdue material. The borrower's institution ("Requesting Library") is responsible for unreturned items following local procedures.

3. Each member Library should run their Institutional Overdue reports as recommended in the *BONUS Plus Circulation Loan Reports Procedures*, and notify the Requesting Library of any BFRs via the contact emails provided. As a minimum, the Supplying Library should check in June and October for BFR items and notify the Requesting Library. This enables the Requesting Library to contact the borrower before the end of the semester /year, when some may be finishing their course and leaving the institution. The Requesting Library may choose to take further sanctions such as placing a block on the borrower's Home record until the item is returned, but this is optional.

4. Within 6 months of the BFR being issued to the borrower, the Supplying Library should invoice the borrower's Requesting Library for the standard amount per item of:

AU$100 item cost $25 processing costs (includes GST, as agreed at BONUS+ Co-ordinators' meeting November 2010). For QUT this is AU$125 replacement cost (no processing fee) and for Massey NZ$160 (excl. GST).

This amount needs to be specified in the BONUS+ loan rules.

On payment of invoice, change the item status to **Lost and Paid**.
Each BONUS+ member library is to follow its local procedures to obtain the billed costs from their own library clients.

5. From the moment a library dispatches an item to a Requesting library until it returns, the Requesting library is responsible for any loss or damage incurred. The Requesting library is responsible for replacing the item or for paying the supplying library the full estimated cost of any such loss or damage including, where requested, any administrative costs involved. This complies with IFLA Guidelines on resource sharing, Section 7
http://www.ifla.org/files/docdel/documents/international-lending-en.pdf

Thus if an item was lost when the Requesting Library was mailing it back to the Supplying Library, the Supplying Library should issue an invoice as in item 4.

6. **Sunset clause on claims:**
If an invoice is not issued within 12 months of the due date of the BFR item, the item should be written off by the Supplying Library with no liability on the part of the Requesting Library.

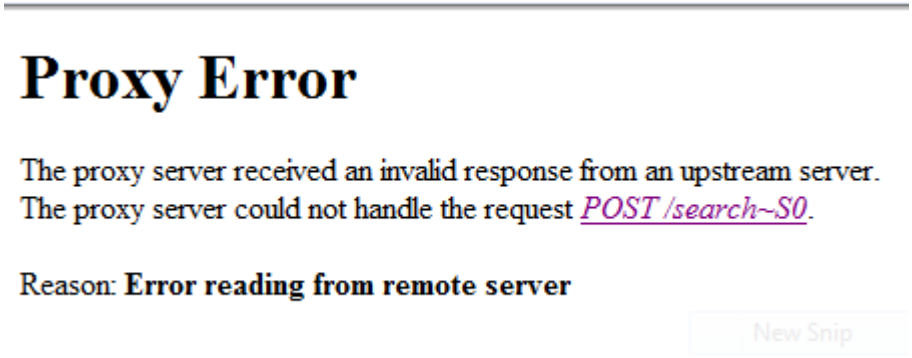
7. Replacement copies generally will not be accepted for lost BONUS+ items. However, individual library internal policies re replacement copies are different, thus when a BONUS+ item that has been paid for is found or returned by the patron, we must send the book back to the owning library to decide what to do with it.

8. Addresses for invoices are available on the BONUS+ AIUG website at
http://www.aiug.org/bonus/bonus-contacts2/

Proxy errors when requesting

Proxy errors occurring during INN-Reach requesting can occur because of two problems:

1. The requester has some problem with their authentication/connection (could be the patron's record, the library's authentication system, a change in the library's firewall, etc.) with BONUS+
2. The requested title is a BONUS+ with a bad link (a broken record).



Proxy Error

The proxy server received an invalid response from an upstream server.
The proxy server could not handle the request *POST /search~S0*.

Reason: **Error reading from remote server**

If you experience a proxy error such as above, test the patron record, try re-requesting the title as the error may be on one copy. If other copies are available a re-request may be successful.
If still unsuccessful, log a call with Innovative Interfaces helpdesk helpdesk@iii.com and provide:

- the title details, the search and the patron information.
- Include **INNReach** and site code **NSWIR** in the subject line along with local site code

Katie Wilson, BONUS+ Project Co-ordinator
January 24, 2014

Unable to check in item

Occasionally BONUS Plus items are unable to be checked in for a variety of reasons that may include no available barcode, or no virtual item information on patron record. This causes problems later if the owning library wants to delete the item, because it shows as "checked out" although no patron data is visible, however if the library tries to check it in it shows as "not checked out".

This rarely happens, but may be caused by temporary delays or backups on the BONUS+ central server.

Lack of available barcode may be caused by lending libraries not checking out an item remotely, i.e. Institutional Checkout selecting the **INN-Reach** button, then **Checkout (to remote site**) mode in Circulation.

If unable to checkin an item libraries are required to:

- Log a call with Innovative Interfaces helpdesk helpdesk@iii.com
- Include **INNReach** and **site code NSWIR** in the subject line along with local site code
- Usually the item is 'freed' overnight

Monica Condon, BONUS+ System Administrator
Katie Wilson, BONUS+ Project Co-ordinator

3 March 2008, 24 September 2010, 19 November 2010, June 2012, September 2013, December 2014, January 2015

Virtual patron records

A virtual patron record is created by the BONUS+ INN-Reach system software when a patron places a BONUS+ request, and the virtual patron record is embedded in the item record of the title from the library that the system selects for loan.

If more BONUS+ requests are made and processed between this patron and other items **from the same owning library**, they are all associated with the existing virtual patron record instead of creating new ones. Continuous activities on the virtual patron record will keep it in the system. It won't be cleared until all BONUS+ items are checked back in at the owning library from this patron and there are no more outstanding BONUS+ transactions for this patron.

Different virtual patron records will be created for the same real patron requesting items from different libraries.